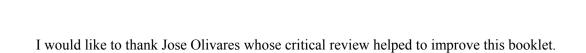
### EndNote<sup>TM</sup> At LBNL

Joyce D. Pfeiffer

Earth Sciences Division
Ernest Orlando Lawrence Berkeley National Laboratory
University of California
Berkeley, California 94720

AUGUST 2003

X6696 JDPfeiffer@lbl.gov



**DISCLAIMER** 

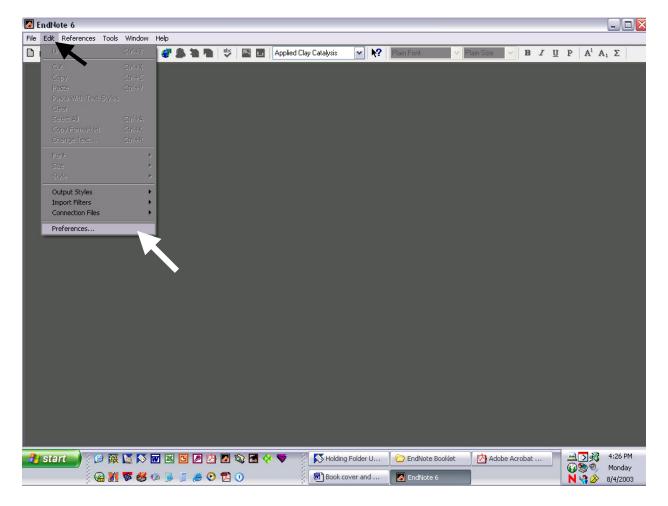
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# STEP 1 EDIT PREFERENCES

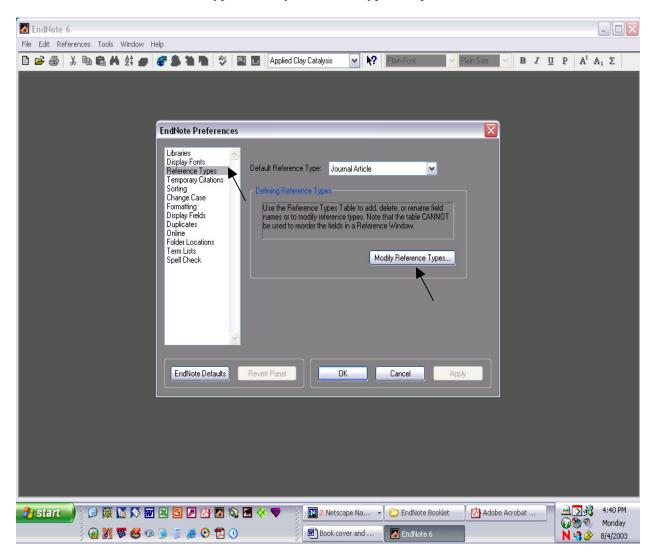
## To download citations from Technical and Electronic Information Department (TEID) the *Preference* fields will need to be renamed.

Open EndNote<sup>TM</sup> application. Choose the Edit menu, preferences.

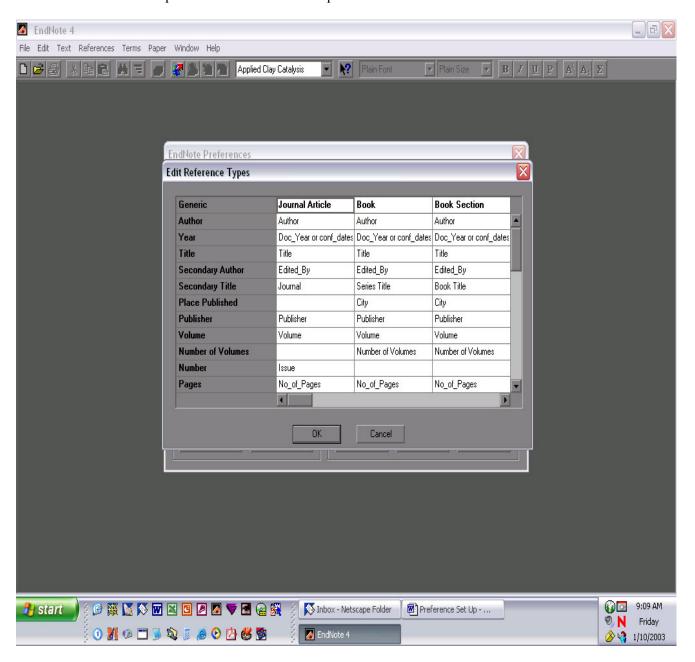


FOR VERSION 6 T	HESE PREFERENCES AF	RE SET UP TO COINCIDE	WITH TEID IN ORDER TO	DOWNLOAD FROM THEI	R DATABASE					
Generic	Journal Article	Book	Book Section	Manuscript	Edited Book	Magazine Article	Newspaper Article	Conference Proceedings conference abstracts, conference papers, conference proceedings, conference posters	Thesis	Report
Author	author	author	author	author	author	author	Reporter	author	author	author
Year	doc year	doc year	doc year	doc year	doc year	doc_year	doc_year	doc_year	doc year	doc year
Title	doc_title	doc_title	doc_title							
Secondary Author	edited by	edited by	edited by							
Secondary Title	Journal Title	Series Title	Book Title	Collection Title	Series Title	Magazine	Newspaper	conf title	Academic Department	
Place Published		publisher loc	City	conf location	City	City				
Publisher	publisher	publisher	publisher	_	Publisher	_		publisher	University	Institution
Volume	jvol	bvol	bvol		bvol	volume		bvol		
Number of Volumes		Number of Volumes			Number of Volumes			Number of Volumes		
Number	jissue			Number		Issue Number				
	jpagination/ no_of_pages	bpagination/ no_of_pages	bpagination/ no_of_pages	No_of_Pages	No_of_Pages	No_of_Pages		no_of_pages	no_of_pages	no_of_pages
Section							Section			
Tertiary Author								Series Editor		
Tertiary Title								Series Title		
Edition		Edition	Edition		Edition		Edition	Edition		
Date	doc_date	doc_date	doc_date	doc_date	doc_date	doc_date	Issue Date	doc_date	doc_date	doc_date
Type of Work				Type of Work			Type of Article		thesis_degree	Туре
Subsidiary Author		Translator	Translator							
Short Title	Short Title	Short Title	Short Title	Short Title	Short Title	Short Title		Short Title		Short Title
Alternate Title	10011110011	10011110011	IODALII OOAL	10011110011	10011110011	10011110011	10011110011	10011110011	LODAL (IOOA)	
ISBN/ISSN	ISBN/ISSN	ISBN/ISSN	ISBN/ISSN	ISBN/ISSN	ISBN/ISSN	ISBN/ISSN	ISBN/ISSN	ISBN/ISSN	ISBN/ISSN	report number
Original Publication		Original Publication	Original Publication		Original Publication	Original Publication	Original Publication	Original Publication		
Reprint Edition	Reprint Edition	Reprint Edition	Reprint Edition	dr	Reprint Edition	Reprint Edition	42 2	di di di	The second second	dr
Reviewed Item	div_reviewed_by	div_reviewed_by	div_reviewed_by Cited References							
Custom 1	Cited References	Cited References								
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Custom 4	Project ID (Account #)	Book Print Date	Project ID (Account #)	Newspaper Date	Conf Dates	Project ID (Account #)	Print Date			
	org units (Department)	org units (Department)	org units (Department)							
Custom 6	group/ program	group/ program	group/ program							
	Accession Number	Accession Number	Accession Number							
Call Number			Report Number (LBNL #)			Report Number (LBNL #)				
Label		<u> </u>						conf_sponsor		
Keywords	keywords	keywords	keywords	keywords	keywords	keywords	keywords	keywords	keywords	keywords
Abstract	Abstract							Abstract		
Notes	Notes	Notes	Notes	Notes	Notes	Notes	Notes	Notes	Notes	Notes
URL	URL	URL	URL	URL	URL	URL	URL	URL	URL	URL
Author Address	Author Address	Author Address	Author Address	Author Address	Author Address	Author Address	Author Address	Author Address	Author Address	Author Address
Image	Image	Image	Image	Image	Image	Image	Image	Image	Image	Image
Caption	Caption	Caption	Caption	Caption	Caption	Caption	Caption	Caption	Caption	Caption

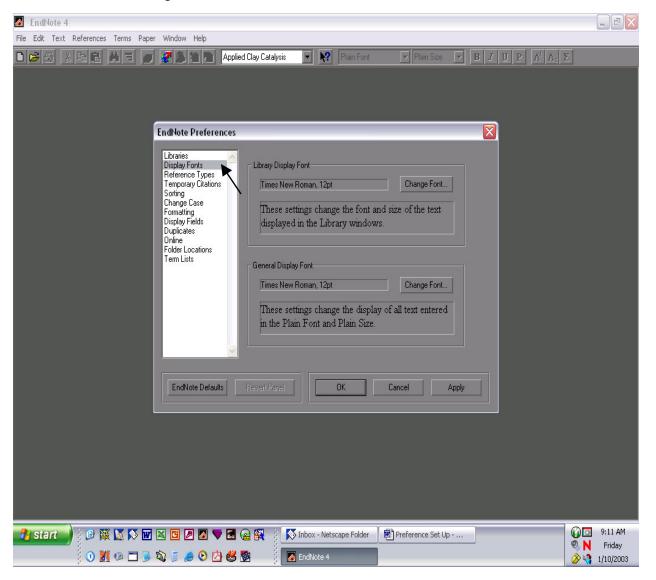
Choose Reference Types, Modify Reference Types to open the Reference table.

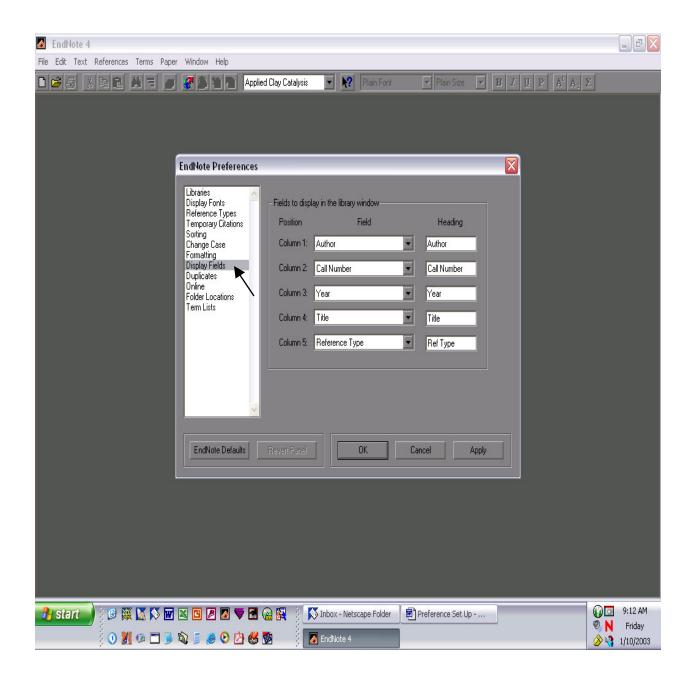


Your default references open and look like this example.



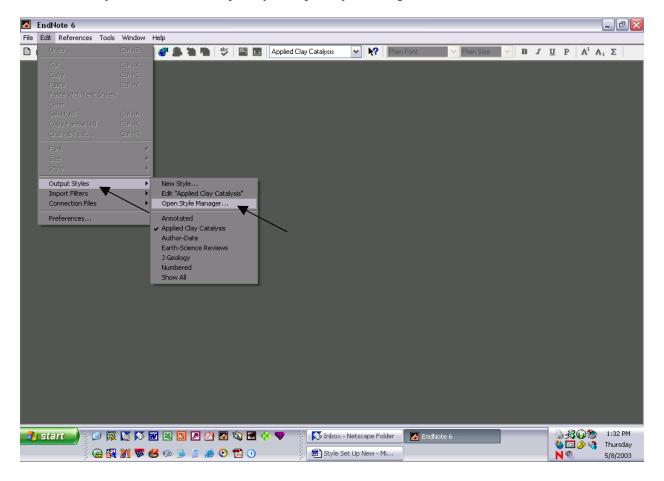
#### Other recommended changes.



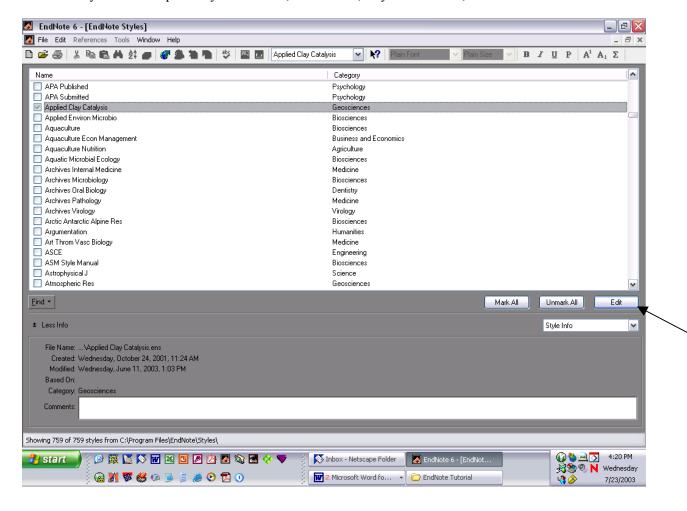


## STEP 2 STYLES

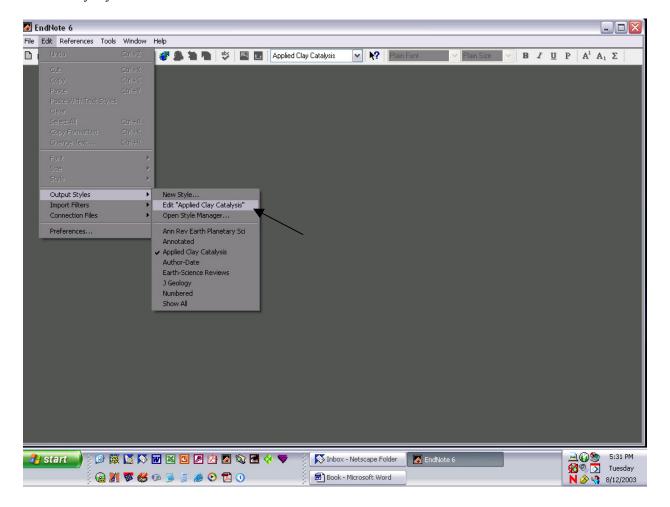
To format a Style, choose Edit, Output Styles, Open Style Manager.



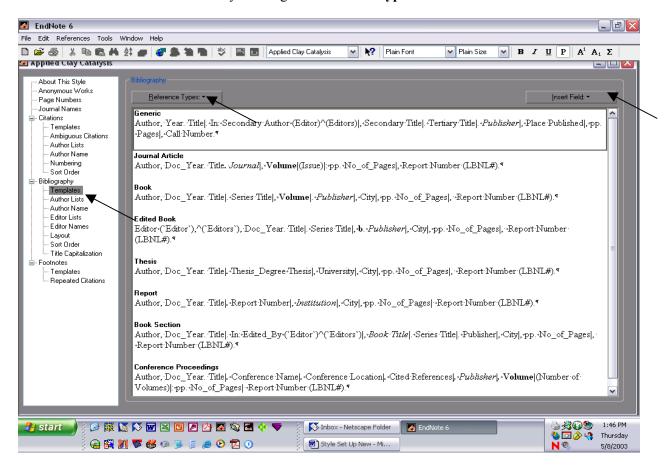
Choose a style that is required by the Journal, conference, or your Division, etc. Click on Edit.



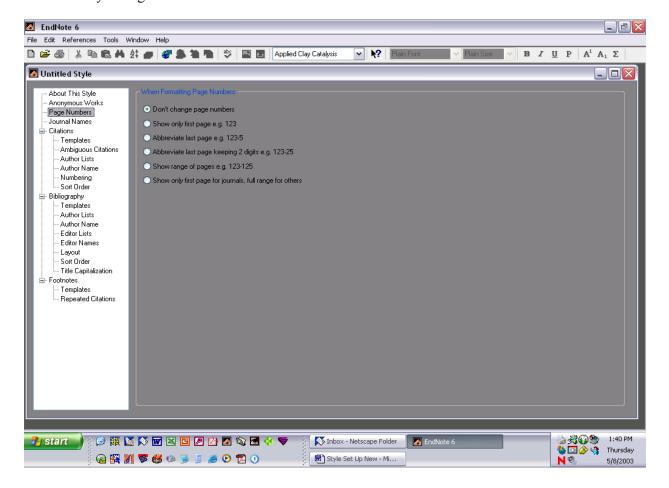
If a style has already been chosen and you wish to modify it you can go to Edit, Output Styles, Edit "choose style you wish to edit"

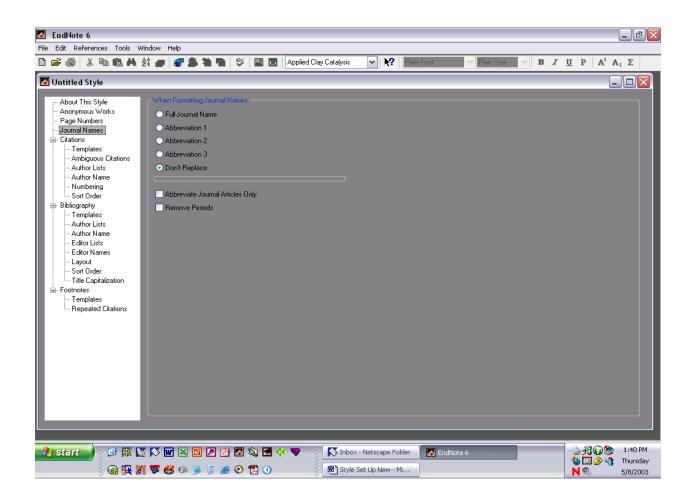


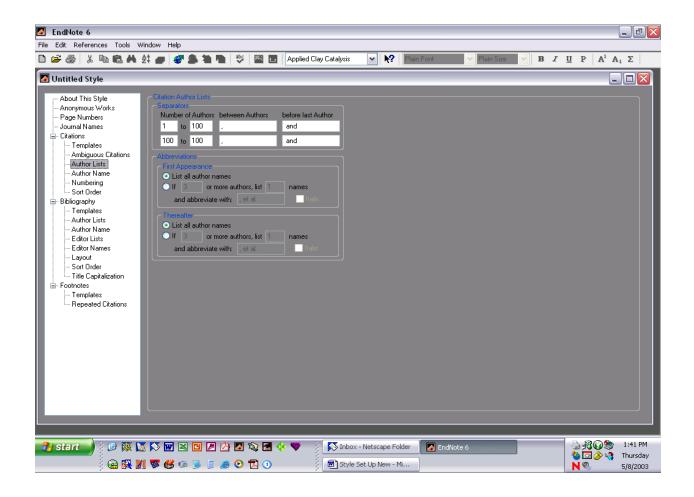
Only the default fields will show up in **Insert Field** unless you have changed your preferences. You can add additional references by clicking on **Reference Types**.

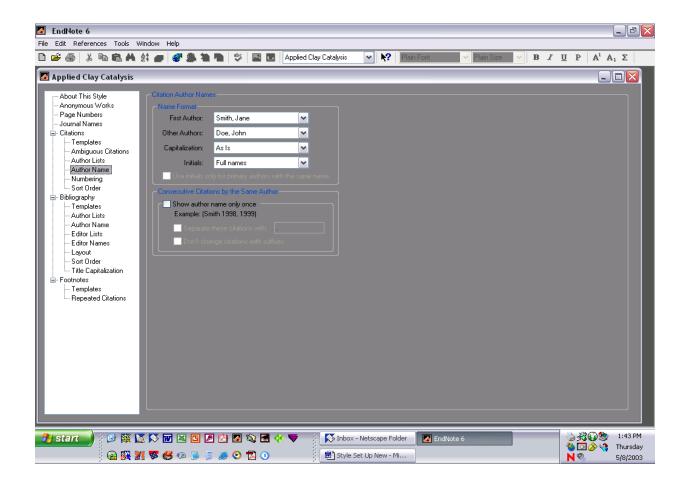


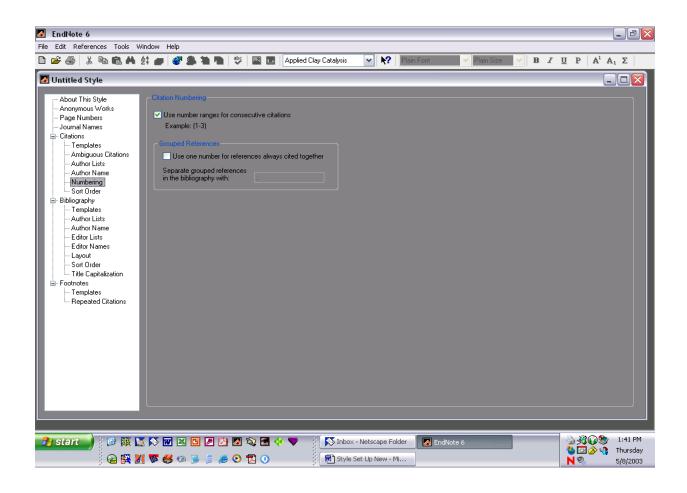
Other items you might want to customize.

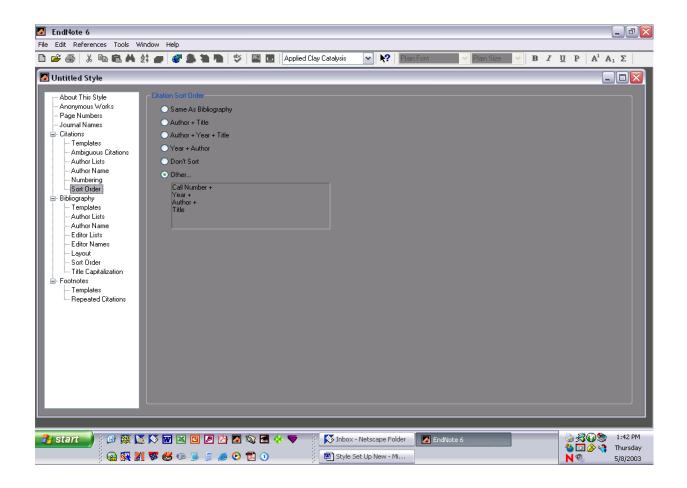


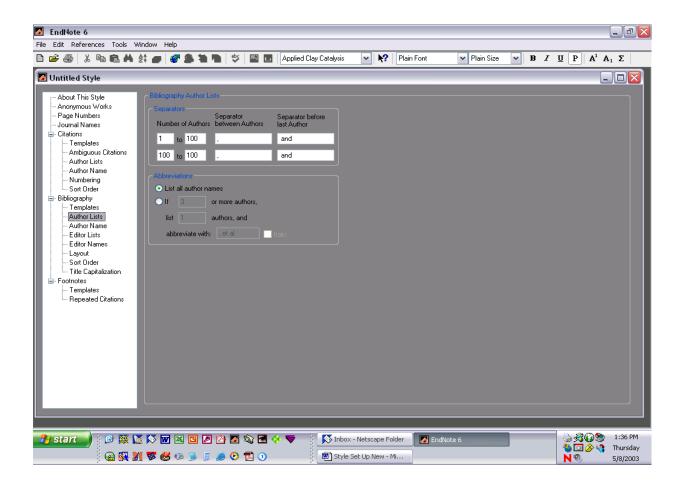


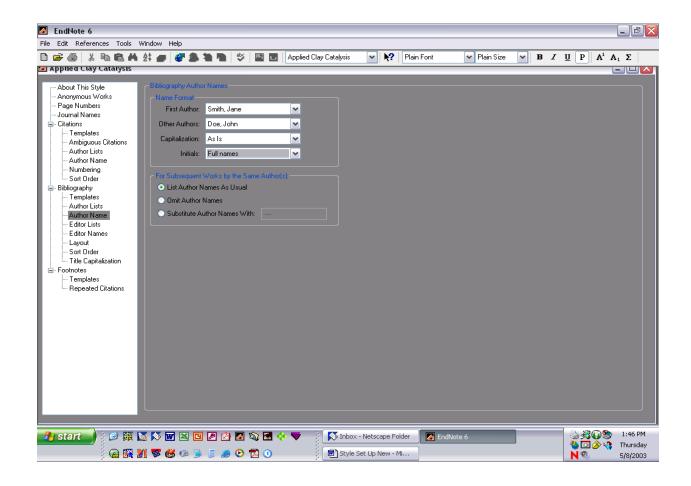


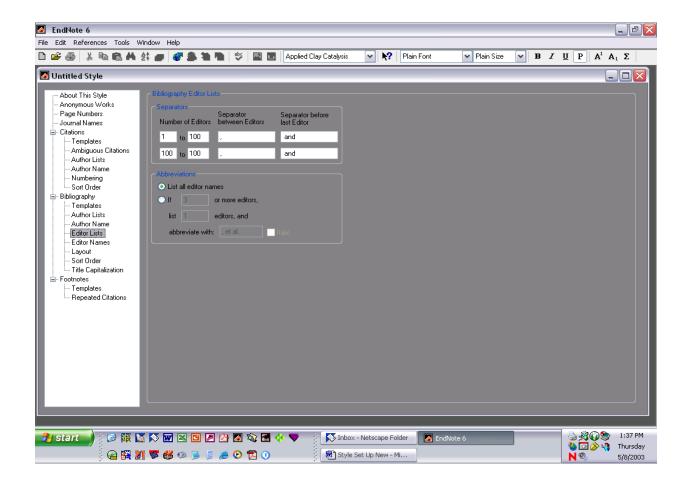


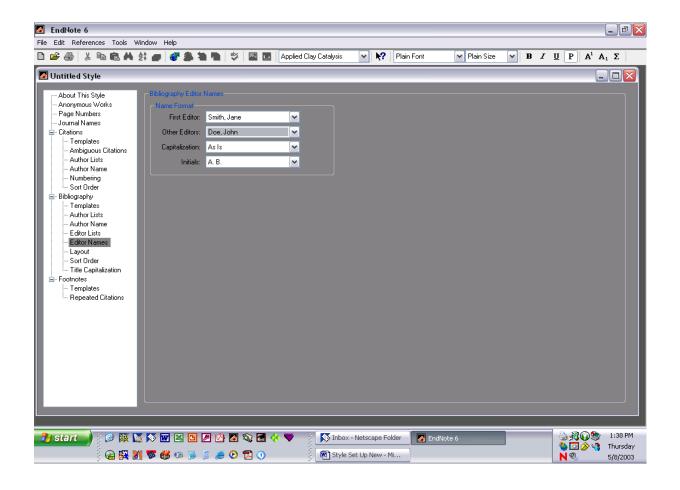


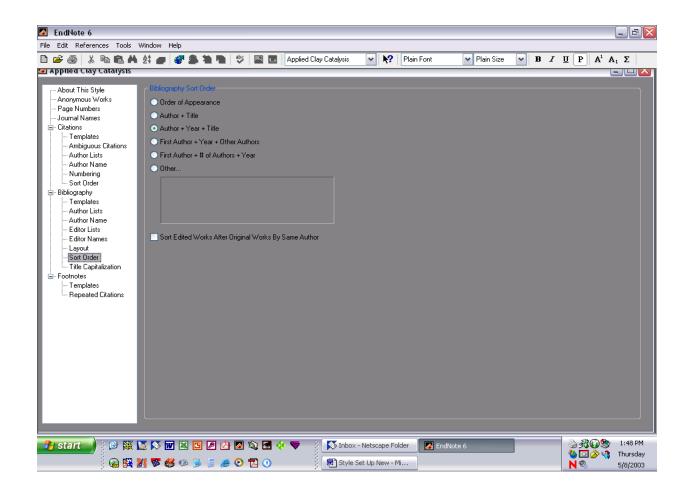


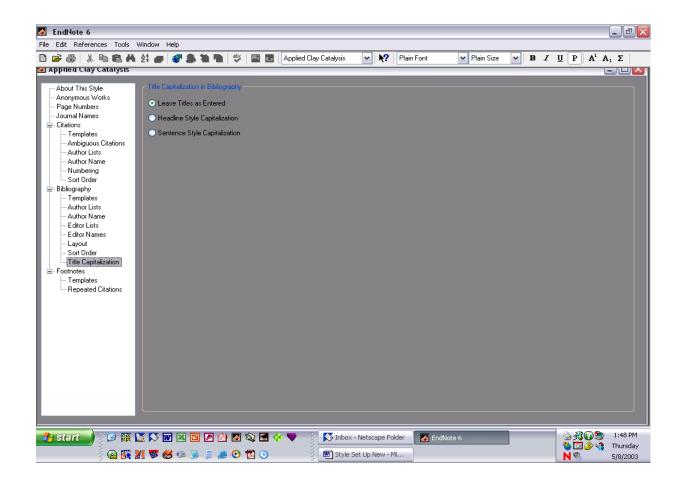












### **IMPORTING FROM TEID**

#### **Instructions to download TEID citation(s):**

For both PC and MAC go to TEID's website at http://www-library.lbl.gov/teid/tmTeid/aboutus/TeidDefault.htm

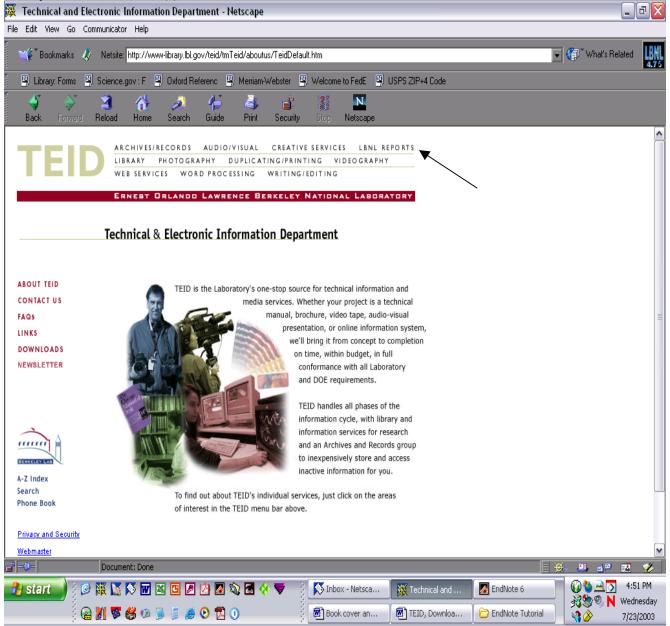
#### PC

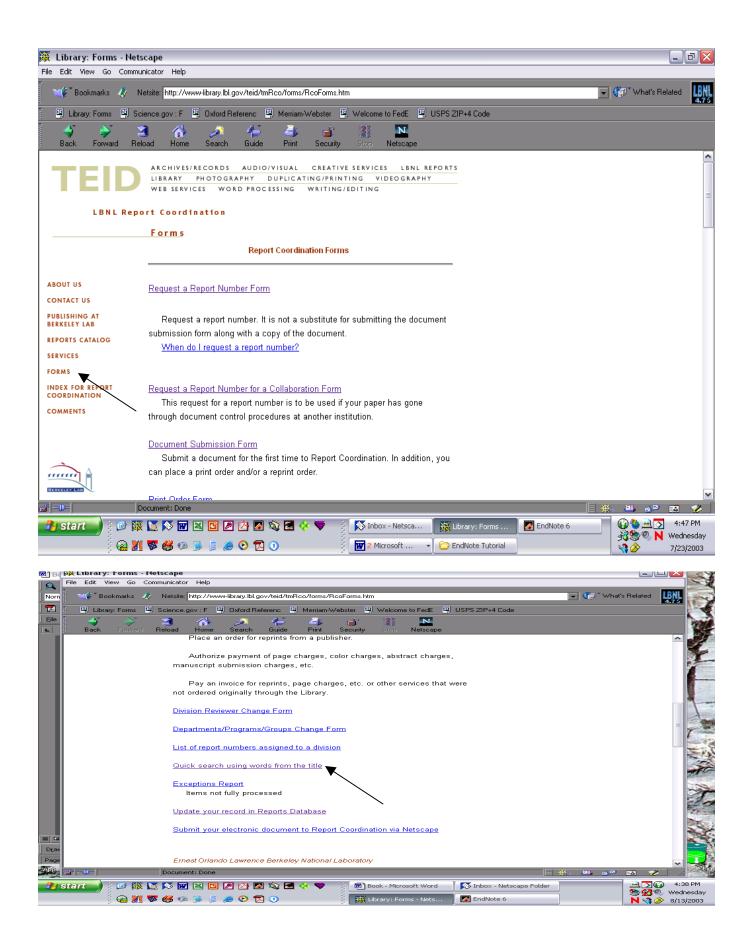
- 1. After you press the "Make Report" button you will get a list of records formatted for EndNote<sup>TM</sup>.
- 2. Select the "File" menu. Within that select "Save As.."
- 3. Name the file and save as type: All Files (\*.\*)
- 4. Open your Notepad.
  - (Click on "Start". Click on "Programs". Click on "Accessories". Select "Notepad".
- 5. Delete ALL HTML statements from the top starting with <HTML> ending with <PRE>
- 6. Delete ALL HTML statements from the bottom of file starting with </PRE> through </HTML>
- 7. Save and exit
- 8. Go to EndNote<sup>TM</sup>
- 9. Choose Import (located under the File menu)
- 10. Click the Choose File and select your file.
- 11. Import Option: Select Tab-Delimited
- 12. Select Discard Duplicates (Duplicates)
- 13. Text Translation: Select No Translation
- 14. Click Import

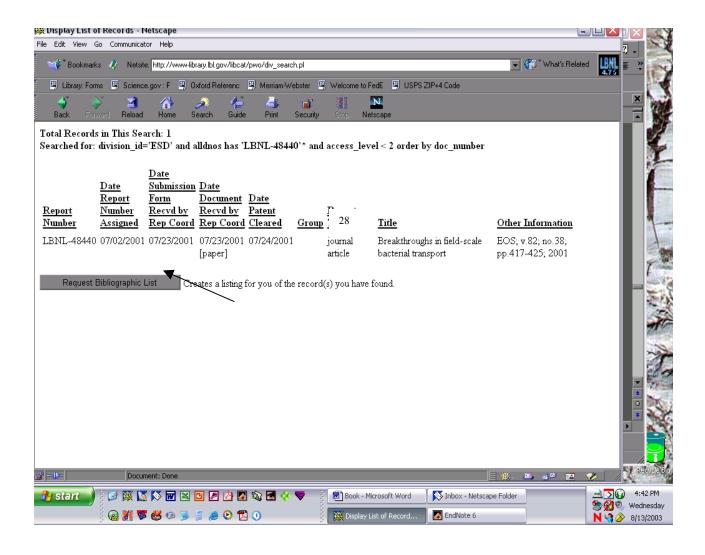
#### MAC

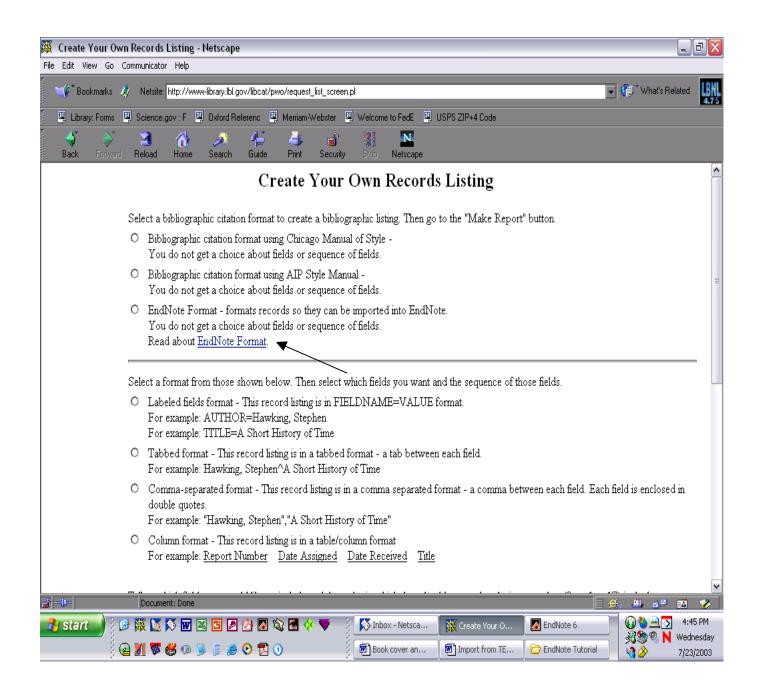
- 1. After you press the "Make Report" button you will get a list of records formatted for EndNote<sup>TM</sup>.
- 2. Select the "File" menu. Within that select "Save As.."
- 3. Name the file and save as FORMAT: Source
- 4. Open in Simple Text.
- 5. Delete ALL HTML statements from the top starting with <HTML> ending with <PRE>
- 6. Delete ALL HTML statements from the bottom of file starting with </PRE> through </HTML>
- 7. Save the file as Simple Text and "quit"
- 8. Go to EndNote<sup>TM</sup>
- 9. Choose Import (located under the File menu)
- 10. Click the Choose File and select your file.
- 11. Import Option: Select Tab-Delimited
- 12. Select Discard Duplicates (Duplicates)
- 13. Text Translation: Select No Translation
- 14. Click Import

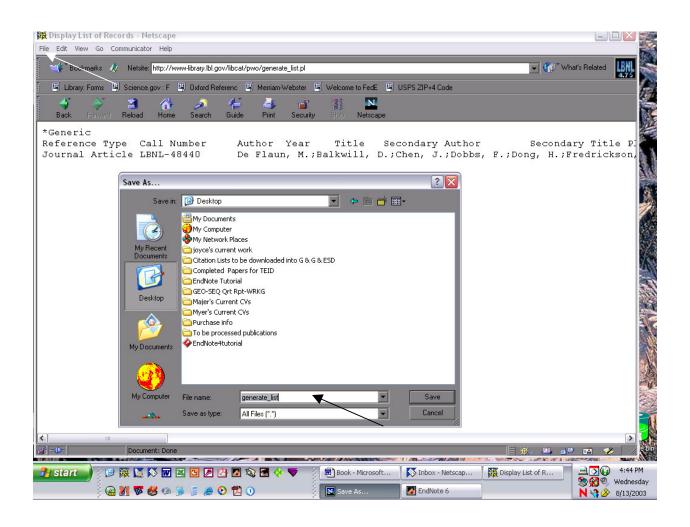
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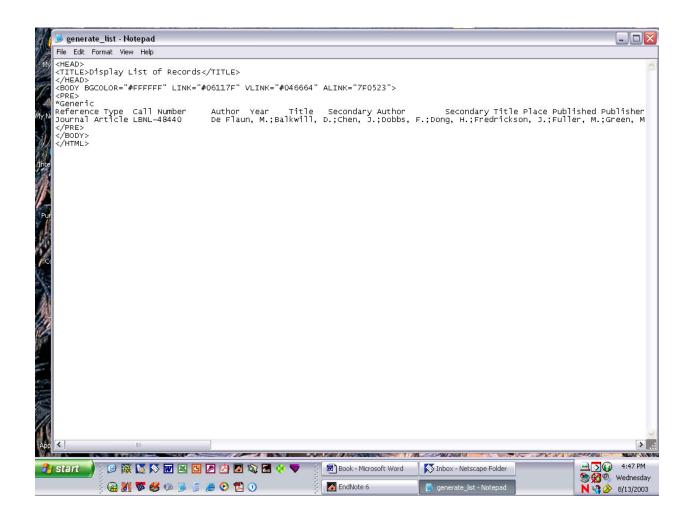




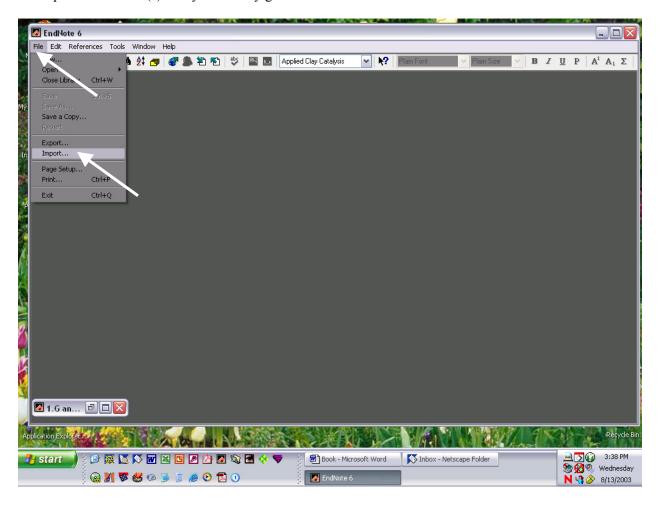


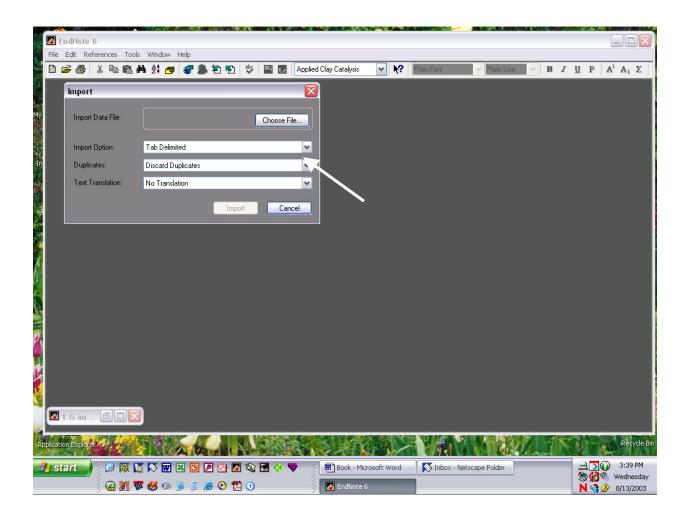






To import the citation(s) into your library go to:





# IMPORTING FROM OUTSIDE LIBRARIES THROUGH TEID OR DIRECTLY FROM EndNote $^{\mathsf{TM}}$

#### TO IMPORT DIRECTLY TO ENDNOTETM

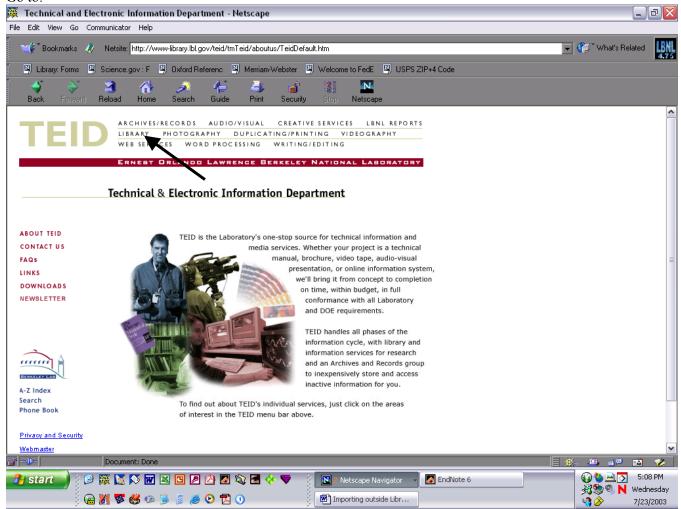
- ❖ Open EndNote™
- ❖ Choose TOOLS, choose CONNECT then Connect. This menu allows you to choose a connection protocol for using Databases that allow direct connection.
- ❖ Enter name and click SEARCH Button, this works just like you were searching a library only in this case you are searching an online database.
- A window will come up with a display of how many references were found. If there are too many then you can close this window and refine your search criteria until you get an appropriate number (Note: when you tell it to go ahead it will download all of those references into a temporary library for you to peruse, 100's of references could take quite a bit of time).
- ❖ A window will display the references; you can highlight and drag one or more references to your permanent Library or click on COPY REFERENCES TO drop down menu to put the references in different libraries.
- Currently INSPEC, PUBMED, University of California (MELVYL), Library of Congress, NOAA, NIH can all be accessed directly from LBNL.

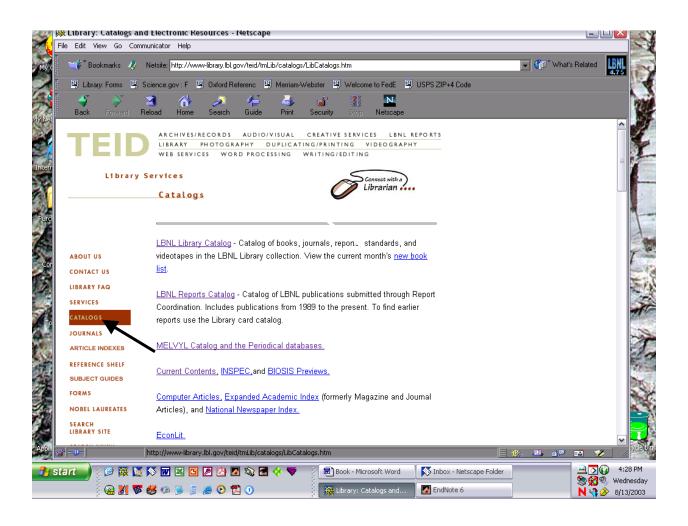
#### TO IMPORT FROM THE LBNL LIBRARY

- \* Choose LIBRARY; choose CATALOGS, located on left hand side of screen, and click.
- ❖ Use the same procedures for MELVYL, INSPEC, and PubMed Catalogs:
  - o Click on MELVYL
  - Choose MELVYL from the drop down list
  - Click on AUTHOR
  - o Type in name (last name, first initial space middle initial)
  - o Scroll to bottom of the page and click on SUBMIT SEARCH
  - o Under SUGGESTED ACTION, click on DISPLAY
  - Scroll down and choose the citations you want to download and click on DOWNLOAD
  - o If you didn't select particular citation(s) you will have another chance by either clicking on DOWNLOAD ALL or the second line where you can designate i.e. 1-30.
  - o Go to CITATION FORMAT and use the scroll down message and use TAGS LONG Click on DOWNLOAD NOW, designate where on your computer you want the info downloaded
- ❖ Open EndNote™ and choose the designated Library.
  - o FILE, open IMPORT
  - o In IMPORT OPTIONS choose LIBRARY CATALOG (CDL)
  - o CHOOSE FILE and click on IMPORT
- ❖ Use the same procedures for CURRENT CONTENTS and BIOSIS PREVIEWS catalogs
  - Click on CURRENT CONTENTS
     Do Search for example: Click on AUTHOR Enter AUTHOR'S LAST NAME SPACE and FIRST INITIAL space and MIDDLE INITIAL
  - o Click on PERFORM SEARCH
  - o Go down the index entries and choose
  - o Click on PERFORM SEARCH
  - o Click on DISPLAY
  - o Decide which or if all citations you want to download
  - o Scroll to the bottom of the page
  - o First column CITATIONS, choose appropriate citation request
  - o Second column FIELDS, choose appropriate field (recommend Complete Reference)

- o Third column CITATION FORMAT, choose **Direct Export**
- o Fourth column ACTION, choose SAVE
- o The program will ask you where you want to save the file. You will need to locate the appropriate EndNote<sup>TM</sup> Library, double click and the information is loaded into your EndNote<sup>TM</sup>. With a Mac and Netscape you have to tell it to save to an application and then select the EndNote<sup>TM</sup> application in the Applications folder. It will then ask you for the library to use.

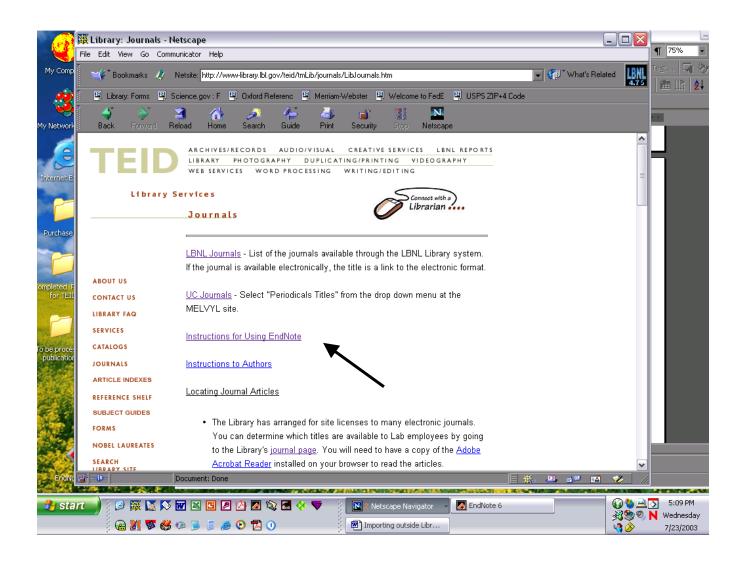
#### Go to:

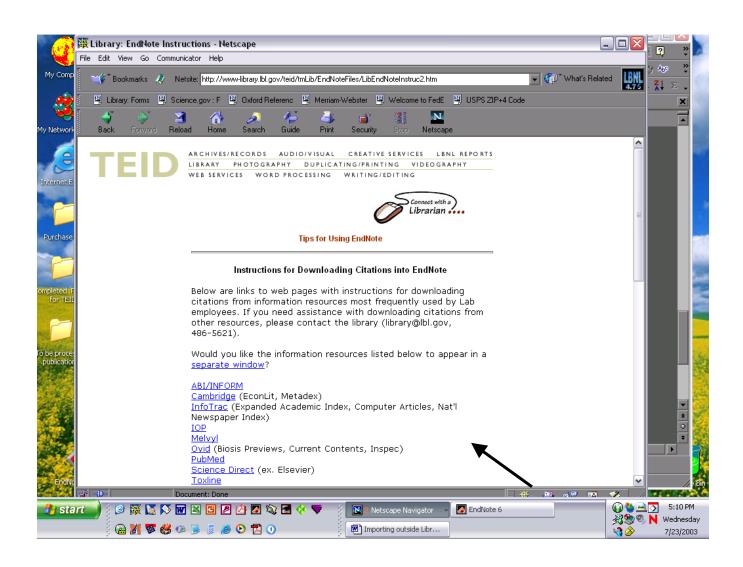


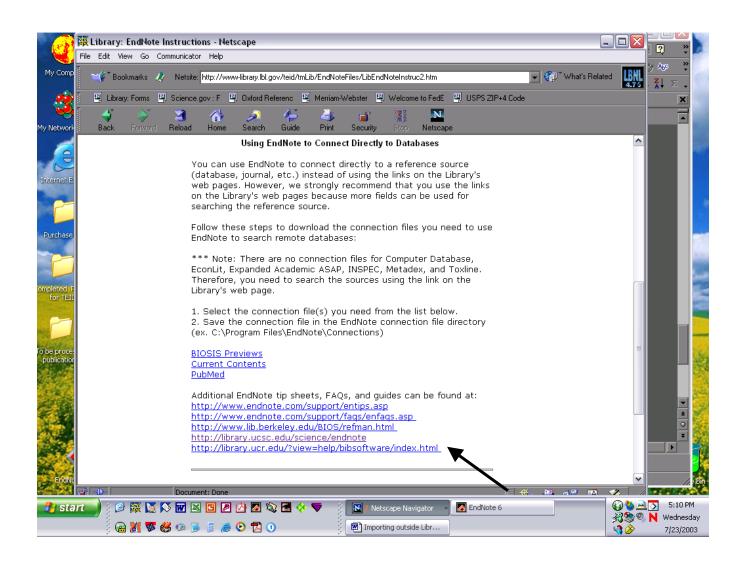


#### For further information:









#### To connect directly from EndNote<sup>TM</sup>

